CaribHRForum Analytics Club Webinar 1 - 2024 Excel Final

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How do you gain the skills necessary to access the analytics leadership Club so if you're here to answer that question you are in the right place my name is Francis Wade and welcome to the first webinar in our conference series and as usual I want to make sure that you're hearing me and I'm hearing you because we are in for a heck of a conversation today if you're hearing me just drop a note in the chat and I'll make sure that I'm being heard hearing great hi jordian hi Olivine didn't you just send me an email yes you did hi Janice hemings how are you and we're seeing people from all over the region oh yeah coming in today we're going to have a very very full house but let me just start sharing my screen so that we can get the conversation going so you may be asking yourself what is this analytics Club of which he speaks and that's why we're here we're here to have a conversation about what this club is does it exist is it real uh and if it's not real then you know well should I pay pay attention if it's not real should I find out uh if it is real is there anything to what this guy is saying and when you hear perhaps not from me but from those who are deeply involved in the world of leadership companies of companies like or um guest Jane and someone who's actually leading an analytics unit in a company and that would be car on so when you hear from them today you'll make up your own mind and you'll say I don't know if I believe Francis or not but today we'll find out so to get things going and we'd love to hear where you are today and to do that I'm going to just pop this pole on the stage and this poll is more than just us you know being nausey we really I'm going to let me hide my own picture so that you can see let's see the poll completely okay here we go and to answer that poll I'm comfortable with Google or Google Sheets or Excel we want to know but it's not just because we're idly trying to be inquisitive and nosy we actually are asking the question because we want to tailor our presentation to the audience that we have today as you can imagine there's probably a wide range of comfort uh expertise proficiency but today the question that we're asking is is one around comfort so let's see we have agree great 52% seems to be winning fantastic that tells us a lot of information folks just keep answering those questions so that we can know where you're at neutral is running just behind agree at the moment so somewhere between agree and neutral is where the Comfort level is okay thanks for thanks for answering that I'm going to pull the poll from the stage has everyone had a chance to answer go ahead going going gone and the winner is agree with 50% and second we have uh neutral followed by strongly agree okay so there's a a a good deal of comfort um so let me close out the poll hide it from the stage I'll bring myself back on and I'll tell you what you could expect from today so we strongly recommend that you turn off all distractions this will be an interactive presentation which means that we'll be nagging you for responses as we go along we'll ask you to drop comments in the chat and we'll be responding to them however if you have questions you'll see that there's a Q&A tab if you follow that yellow line there's a Q&A tab for you to drop your questions so that we can really see them that's the best place to put a question you may find that today if you drop a question in the feed the regular feed that we'll actually lose track of it because other people will be adding on their uh comments and uh we don't have any resources today but after the uh session today we'll be uh I'd say we're repairing to the lounge so we'll be joining the lounge where you may know that we have private tables where you can engage in private conversation with other people who are attending the webinar so it'll automatically page will automatically change   we'll go from presentation mode to Lounge mode and if you're here you want to talk to one of us one   of the speakers or any of your other colleagues all you have to do is to click on a table   and you'll be instantly placed at that table and you'll be able to have a private video and audio   chat with other people who are on the table today's session is being recorded and there   will be a limited replay of this recording all the way up until around August 17th or or so and right   why I say August 17th because that's the date of our second webinar so where in the world are you   if you're not familiar with kbhr Forum actually no one here has seen this chart before so welcome   to our conference Series so our conference series is starting today September 26th it continues on   October 17th webinar number two second webinar these two first webinars are complimentary as   you can see from the screen then we're going into training around Excel spreadsheet training which   are the first two workshops that are going to be in the month of November we're taking off   December and then we're coming back in January for analytics or analytics unit Workshop some   very very unique training that we've detected in our work that we've done with um in analytics here   in the Caribbean so if you have no idea about Carib HR forum and what we're about our our conference Series this is our fifth Series in a row started during covid as you can see the one   in the top left 2020 yep that's the first time we had an online conference a virtual conference   and it was a three-day conference and for the first couple of conferences we had a wide range   of speakers and we tackled all topics then we started to detect that there were some real needs   in our community in our membership in the area of analytics and we focused down a great deal to one   topic which was HR analytics and that was in 2022 now when we focus down in that year we found that   the number of experts in the region was small so we kept the topics very very quite Broad and what we've done iting last year is to say not only is it about HR analytics it's about people analytics which means that analytics would cover any part of the business that relates to people so any manager should benefit from using people analytics right including the seite any supervisor even the board as long as the analytics have to do with people So eventually at some point we'll be hopefully attracting Managers from across the board in the region who need expertise in people analytics but for the time being our Focus has been on our HR audience and why have we focused on our HR audience well I'll tell you why in just a minute but right before then I'll give you a couple of advertisements the first is that we are currently under taking our annual it's now an annual event our Caribbean compensation survey in partnership with Mark rim and there you'll see a couple of links let me let me drop one of those links in the chat if you've not completed the survey yet here's one of those links here we go drop that in the chat now our take on this particular survey this year is that this is an opportunity to create data it's an opportunity to take that data and share it with your management team it's going to be unique in the sense that it would show your data but it would also show your data in comparison to other numbers in the in the country that you're in and in the region so guess what it's a great opportunity to engage in people analytics and guess how much it costs drum roll please it's absolutely free so consider this to be an opportunity to get your hands and your feet wet actually creating data for presentation at highest levels of your company if you find that the the offerings that we have here at kbhr Forum are like let's say for argument sake that you're someone who's at a higher level at you are Beyond powerbi you're beyond Tableau and you are looking for even more background in HR analytics aihr offers a analytics certificate in the programs that they offer so this is a Dutch company that we part partnered with they have a two-year program sorry a 12-month program and in that 12 month program I think you take 10 to 15 different uh courses and one is definitely in HR analytics now you may be wondering wow that that sounds Way Beyond where I am maybe I shouldn't even be in today's webinar well the good news is that today's webinar is for you if you're an absolute beginner you don't even know the first elements of using a spreadsheet you've never used a you never used Excel it's also for you if you are proficient and have not yet made the transition to the real Analytics tool tools let's call it that like powerbi and Tau uh those are the ones that really pack a very very big punch and the ones that people who belong to societies like this one use routinely so what's this well since last year Stephanie and a group of others have gone ahead and created a society for people analytics I think I have I think I have is saved yes I sure do if you want to find out more about the work that they're doing it's a couple thousand people that have joined in a very short space of time so it's just a sign that the business of people analytics is taking off here in the re here in the world actually not just not just in the region but it's happening in the world and it's going to take on a whole new life of its own so if you're here wondering what the future is of this particular approach you're in the right place so to get us going and to sort of bring us into the world of being a Caribbean HR manager here is Celio Celio is an HR Manager and she's just been reorganized up until a month ago she reported to the CFO but guess what he up and left the company so now she reports to the CEO directly and and she's hoping to receive a real promotion with a VP title and all the related perks maybe a c CHR o title or a CFO title what she's thinking of so far the CEO he's not really mention the possibilities her boss hasn't really talked about this she has it like a you know a private wish so she's sitting in her very first sea Suite meeting in her new capacity and she's kind of shocked at how fast the conversation is going the CEO he's gotten up and he's pointing to the screen and he's pointing to a spreadsheet that's on his laptop she's sitting beside his laptop and he turns to her and says Celia can you increase the interest rate by half a percent and he's still looking at the screen he's his back is to her and he's sitting there kind of waiting for the numbers to change but nothing is happening so he kind of turns around to see what's going going on and he says any day and all he's kind of laughing and you know thinking that she didn't she didn't get didn't hear when he asked him to go ahead he says now he really turns around and he looks and her face is bright red now not all Caribbean people can go bright red I'm one I'm one of the ones who can but she's flushed why her fingers are hovering over the keyboard but they aren't hitting any Keys she's Frozen and then the truth hits him and everyone else in the room at the same time he doesn't know how to use Excel and he gives one of those ey rows one of those Caribbean ones after a sharpen take of breath and probably a chips of his teeth he picks up the laptop and makes the edit so the meeting continues without missing a beat but the next few times he ask someone to change the numbers on his spreadsheet he turns to his chief marketing officer after the meeting Celia calls her coach and she says I need help and I need it fast so the problem the challenge that we're facing today is that according to the CEOs that we worked with and Jane will weigh on this and so will Kon that people antic skills aren't developing fast enough for their liking in last year's conference we detected two areas that were of particular particular problem problem areas let's call it that the problem areas were the first that the core skills that you would want to have to operate in the seaweed in order to be a full member of the inside Club those skills are missing and the Second Challenge is that whether or not the skills are missing forget that for a moment is that CEOs are turning to their heads of HR and they want people analytics units to be developed anywhere so they want the units and they want the capability to happen whether or not who knows Excel I don't really care I just need it to happen in the business who can I turn to who if I need to turn to it I'll turn to it but I'll turn to whoever I need make sure that you're still hearing me because something just clicked could you put a drop a note in the chat if you're hearing me let's see yes okay so nothing nothing weird happened there oh okay my share screen just disappeared so let me stop I don't think you're seeing my screen okay something happened there let me share my screen again interesting that wasn't me let me see what okay all right so there we go again so our conference this year is focusing on these two skills these two abilities or capacities two which are particularly nagging for the reasons that we'll share okay so I'd like to hear from you what are some of the challenges you have in expanding your Excel skills whether you're a beginner you're an intermediate or you're someone who's using you know the highest level tools like I mentioned before what are some of the challenges that you're facing go ahead and drop your answer in the chat and in the meantime I'm going to work on bringing up my colleagues join me on the stage what are some of the challenges one of the things that we know from dealing with lots of people around Excel skills and analytics is that there's sometimes a little bit of embarrassment and we'll address some of that um often HR professionals believe I should know more than I know and I don't like to be caught out the way Celia was caught out and we want to be on the spot so folks it's a safe space we'll be gen but what are some of the challenges that you face in expanding your Excel skills regardless of the the level that they're at right now Arlene says time we caught up in meetings writing and coaching great thanks thanks Arlene who else go ahead remember we said this would be interactive understanding the formulas says uh Daran great who else just keep dropping those notes in the chat working with formulas Elma says uh formulas those formulas can get you out and really the the question that the CEO was asking oselia had to do with adjusting a formula on the fly on the pressure who else is she's getting folks are are are agreeing with the formulas any others okay right so while we're working up some courage folks I'm going to introduce you to our two guests because they are actually here on stage and when I introduce them I'm going to ask them to say something that their face pops up on the screen Jane is the first female CEO of the business Supply Group in the company's more than 45 years of History companies located located in sh Tobago and guess what Jane hold is a master of human resource Resource Management so I met Jane when Jane was an HR professional HR manager and she's gone on to much greater things since then Jane am I am I over selling your rise to the Sea Suite or am I accurate you're accurate are you hearing me yes you're accurate I mean hyping it up a little bit but excellent folks you may you may you may know that there's not that many HR professionals who have made it to the Sea suite and in fact I don't know I know of one other person who was an HR Manager at one point but doesn't actually have the training but very very very rare to find we're really really glad glad to have her here because she's going to as you can imagine she's been on both sides of this issue so we see what she has to say Kieran ranesh is an HR on people analytics professional he has a very background data analytics human resources and organizational strategy he also heads up the people analytics unit at cariban Airlines here on Welcome to the webinar hi Francis hi everyone uh you all seeing me well uh not yet oh it's just not loading hold on ah there we go oh there excellent excellent all right great thanks thanks Kon so folks there's four secrets that we came up with when we put our heads together secrets that would allow you to play the same game that the others are playing in the sea Suite because the truth is there's you could imagine if you don't haven't imagined this already that there is a quiet conversation happening between the CEO and the CFO and this conversation Believe It or Not wasn't all that important before the early 1980s but since then the CF F's profile has risen to be almost at the same level as the CEO and some companies they're at the same level and the language that they talk between them is a language of what's the

Abit of this month how can we get it Up by Five Points next month um what's our or Revenue like from the different business units what happened to this business unit why are they 4% it's all analytic between a CFO and uh CEO and as a result CFOs have gained in power in the SE s and they are bringing along the other functions like marketing and sales and um operations and they're becoming more analytic so when we talk about this secret leadership Club it's a club in which analytics is the point of entry that's the ticket to get in and having expertise in analytics you know Way Beyond the level of what you saw with Celia is not just important it's how the big decisions get made so here are the four secrets that we want to help you to answer or know about and make some progress and we're going to offer some Solutions in each of them and tell you some of our stories the first one I said it has to do with what arene said which is finding the time without overworking yourself the second is how to find the budget you don't want to be in the position where you have to beg for the budget going to be in a better position than that but find the find the budget to improve your skills and that of the other folks in the entire business but let's focus on HR for now how to convince your management that you should have these skills because there are some CEOs who think to themselves that I wish my HR manager had these skills but they don't demand them of the HR function so they don't really ask because they don't expect the expectation is so low so how do you convince your management that they you should have these skills without looking as if you are less than or feeling embarrassed and the fourth is how do you show the ROI from having these Excel skills without needing to sell sell sell and prove prove prove so let's Jump Right In with the first secret so the first secret has to do with time management and finding the time to improve these skills so actually this is one where I'm going to share a little bit about the book that I wrote on this very same topic so the book that I wrote is perfect time based productivity and the three-part framework I want to share with you has to do with capturing emptying and scheduling I'll explain what that is in a minute but just to give a little bit of background I returned to live in Jamaica in 2005 and prior to returning I was someone who used to teach time management training when I lived in the United States and um that mon had a lot of training and had been delivering courses and actually stopped doing it because i' moved on to more strategy type stuff as opposed to time management type stuff when I came back to Jamaica I thought oh this shouldn't be too hard because you know I've been pretty effective in the states H anyone here has returned from living in a developed country to living in the Caribbean you may realize that what my heart means is that it was way harder than I thought what I discovered was that things were flying through the cracks and I was being very ineffective and I decided to try some new techniques and they didn't work I thought that what I had been teaching was wrong and part of it was wrong yeah the new techniques I picked up didn't work and in frustration I went to do a whole bunch of research that research led me to pick up time blocking in a new way it also led me to read this write this book and the stress that I had experienced at the time melted away so I'm going to share with you what these what this framework is the three parts that I just shared um before I do that you may wonder you know this this the name of the book The subtitle of the book is how to rescue your peace of mind as time demands increase the whole book is about time demands and a Time demand is like an internal task that you give yourself in other words it's a individual commitment that you make to yourself to complete an action in the future so here's how the framework Works in a nutshell first is that you write every new task down on paper or you capture it electronically no matter what the second is that you set time aside to empty that piece of paper and you empty that device you take those tasks and you empty see them into where a schedule so if you're to watch a high performing college student you would see that they do this regularly and when it comes to learning a new skill like Excel and IT you know there just not the spare time in most people's day to learn a skill like that it's got to be in your calendar it's got to be scheduled so in the training coming up we're going to encourage encourage you to schedule your learning in your calendar including class time homework time we're going to have you in cohorts in small groups we're going to maybe probably have you have a coach for your small group so spend time with your coach it should all be in your calendar and when something is in your calendar the research shows that you're way more likely to achieve your goals especially when it comes to new skill acquisition but let me bring Karan and and um Jane into this where have they used a technique like this um where has it made a difference um they can share from their own experience because both of them are extremely time stressed individuals I don't mean stress what I mean is that they're they commit to very big things in the work that they do um especially at the highest level so guys you want to anybody want to jump in or who like to jump in first I I'll say ladies first but I'm not sure if Jane wants to jump in I can I can jump in are you guys hearing me clearly yes yes okay um for me time management is something that I struggled with at the beginning like Francis even though I did teach time management at one point when I worked at scosa bank and I did find that time blocking really makes a big difference as a leader as well you don't create enough time for those strategic elements of your day and planning strategy and stepping back to think about the strategy of your department doesn't happen when you have the time because you never have the time operational issues will always be at the Forefront so anytime I wanted to reflect on the strategy kind of do a comparison of where I was last year to this year um get kind of some of the action items that are supposed to support the strategy and look to see how far along I'd come and the team I would book time with myself and it would say strategy review with Jane White so that I could actually lock it in because otherwise it doesn't happen by accident when I'm just s sitting down twiddling my thumbs at work because that that almost never happens so yeah so that's my experience yeah so um I I remember you know early in my HR career because I fell into HR by accident as most most people would know and it was trying to understand what's happening in HR now I had some Excel skill coming from an IT background but applying as I mentioned in the chat you know applying some of those skills towards you know HR activities HR projects it was a bit of a learning curve to try to understand how do we shift that and balancing you know putting all the fires you know the operational stuff as as Jane mentioned they do take up a lot of your time so what what I started doing was blocking off sections of time on my calendar and I'm I'm more of a morning person so if you're a morning or afternoon person you block off a half an hour section you know off your time just block it off and and call it let's say development time or Excel time that kind of stuff and what I I use that time for for me it was early in the morning and I would practice you know a new function a new formula um and look at you know some HR data and learn a little bit every day it's incremental and it gives you the practice all the time so you're kind of forcing yourself to say okay this block of time is for this and I'm not going to allow other items to come in the way you know so so that that's what actually helped me develop and of course continue to develop because I'm looking at you know more powerbi stuff more AI type uh Technologies so I use that time every day and as Francis said we are you know involved in quite a lot of stuff so it's it's difficult to manage your time if you just have it running but if you have something notifying you that this is what you have to do um even an alarm popping up you know to to alert you herey you have one to 130 to to set towards this time it will work you know a little every day yeah so that's just my take on it great than thank thanks guys now you you may you very right and correct in asking if you're just joining the webinar you know what does what in the world does time management have to do with learning Excel skills and it goes right to the surveys that we did of um of our membership of the conversations that we had with those who were in the class last year and right to what Arlene said about having the time is that many HR professionals do not pick up these skills but because they say to themselves I don't have the time so one of the parts that we're going to be putting into the program the training that we're going to be offering is how do you create this time it's it's for us given the importance of having these skills we want to give you everything that you need so that you can end up at the end of the day being able to demonstrate that you've picked up something you know know something that the sea Suite finds valuable and you did it because the sea Suite finds it valuable and because it's critical to the core of the business where these secret conversations are being held okay all right so here's the second secret how do you find the budget to Kickstart your Excel skills so I'm moving on at a clip here just because interest of time so budget is a huge issue that we've picked up uh as we spoke to people um and the the notion is that the company won't pay for my training in this area um and I don't want to beg um there is no budget left for training HR as you probably know 20 years ago 15 years ago compared to today there were massive training budgets and most companies are as a result of the recession and covid have now cut their training right back to the Bone and the budget for hr's training is particularly lean because all the training dollars are going to the essential functions that the company can't do without so this is a this is a big deal because the person who has to be convinced well let's let's bring Jane up because Jane came up with the lunch budget framework and I'm going to ask her to to share how she created this framework so there's four bits to it it there's Gap search isolate and learn okay so it's a launch Bud budget framework so let's let me ask Jane to come up and and share with share with us how she created this framework and how she uses it and she'll take us through each of the steps one by one hi guys so the lunch budget framework is very much um like the lunch and learn kind of concept and I know that we speak about not having the time which was the number one Secret and not having the budget um however for me these are just excuses at the end of the day there is so much free content that is available more than ever before so when you look at platforms like YouTube um Instagram even Tik Tok which is one of the most frequently used apps that I use right now because it's now like a search engine so it actually operates similar to Google especially for all the Gen Alphas gen Z's gen um the Millennials they have started switching that into their new Google believe it or not and if you're not on Tik Tok that's okay I suggest you do um it follows algorithms that you like so for a little while I went down this whole um little rabbits eating strawberries and that's all that I saw um little rabbits so it was quite cute but again it what what you like and what you follow is what you fed more into on Tik Tok and we're talking about short form content which is 30 second 60 seconds the longest kind of content that I would normally look on Tik Tok is two minutes and you can choose something specific to look up and watch it in under two minutes under five minutes if you look at more of the longer form content that you see on YouTube you can literally search HR analytics formulas you can copy and paste from things that you find on Google you know so for me um time is not um a relevant excuse or budget and some of the things that you can find that are free and available uh uh all over now what I would say is you're not going to get an expert level on Tik Tok and YouTube um immediately although there are a lot of modules uh for Excel but it's not necessarily the same as an actual course but you can upscale yourself and I would encourage every single one of you to just type up HR analytics uh formulas in Google and you will see what you can get you can literally copy and paste it you can even do it right now as you're listening to me pull it up look at it later and so once you identify the specific Gap that you have you can then actually just have that one item go over it for five minutes in whatever medium you want in terms of where you receive your content and get those specific uh formulas or those specific rois that will be helpful to you and in that way you close your skills Gap in a very short space of Time for free so that's really the lunch budget framework that I normally think about when you know people tell me I don't have the budget and I don't have the time and my thing is you eat lunch well then you have the time and if you don't eat lunch you should be eating lunch and you should make the time to do that so that's that's my thoughts on uh my lunch budget framework I ju Just Dropped a question there for you Jane about the transition that you made because I you as you back in the days when we you and I used to have lunch or used to meet at rituals yeah that yeah you were HR I suspect that your relationship to budget was very I know your relationship to budget was very different than it is today and the the the thoughts that you have to about the budget have changed over time can you let us into a little bit of how you made that transition from being an an HR professional all the way to CEO to the point where budgets mean well you tell us you know what was that like making that transition throughout your career yeah for sure there's a difference you know when you are fighting for your budget in HR um you expect it to be approved and you can't well for me in particular I could not imagine how they could not approve these training budgets because it was so important and don't they understand the value but going into that CE role the mindset shifts what is the value how am I getting value from bringing all my uh managers into one room providing them with lunch um having their staff on their own for an entire day or three days what is the value because I'm now managing overall budgets and when you're faced with breakdowns whether you work in a manufacturing organization or you have different factors and different elements to pay for that are really critical and when you're ordering stock um the training budgets do fall behind in terms of priority so then it is about showing the uh need for these budgets and I will give you an example so my HR manager that I have now who's amazing H shout out to Christine King she um would come to me with budgets as well and I would forget everything that I knew in my past life as a HR professional and I was like we don't have the money and that would kind of be my blanket statement because as a CEO you really kind of have to fight against that mindset especially when you're trying to manage expenses tightly and I would have had the conversation with her and we would have done time to hire metrix like how long is it taking us to replace a position and what we would have done is go through our free versions our LinkedIn posts a Facebook post Instagram post and many times we would get the right people through those methods however when it came to salespersons um when she showed me the data and said Jane the time to hire for non sales positions takes about two to three months but when you're going for the free options the time to hire for a salesperson just using traditional methods is now taking three and four months and then my thing to her was why didn't you just say that and she was like I was trying too I was like you didn't put it in an Roi metric that I could understand because now my brain is more CU than it is HR so it really is trying to uh Orient yourself and understand that every dollar and Cent can and it has to be worth it and I do believe the training budgets are worth it and I do believe recruitment costs are worth it and all the HR budget are worth it but we have to link it for the CEOs and the CFOs to really support and validate the um those expenses and what I would have seen sometimes in my journey to add value from a HR perspective some of the things that I wanted to spend money on um I think we nice to have and I'm not seeing like team building and I'm just chalking up all the Nic to haves um as those types of things because there's lots of elements under the soft skills category that are important but when you   really look at what you want to spend money on if you're tasked with reducing your expenses it it   gives you a different lens and you understand better about what uh value creation is added   to the company level from that expense St point point so it definitely is a mindset shift going   leaving each and coming into the CE Ro can can you take us through the the four the four   unless unless Kon wants to jump in with a a a a experience of his own um Kon or should we should   we have Jane take us through the four steps uh uh just just a quick one because as as Jan   was talking there were like about three or four scenarios that that just kind of popped up for me   and and she didn't mention you know manufacturing and I was in a scenario where we had to kind of   figure out you know overtime payments that were happening in within manufacturing and to build   a model in terms of showing two two um scenarios where do we continue with a particular shift type   like you know the 12 hour shifts or do we run like 38 hour shifts and to build that model I   didn't really know at that time because this was maybe about 12 13 years ago and I had to do some   research and yes YouTube was was helpful at the time but also documentation uh we w we aren't luy   like today with with all all of the facets and the media the social media links right and being   able to isolate that and pull a function that was able to to actually show the difference you know   if we run two shifts or three shifts and we had to pay the overtime plus that it actually lent   towards you know the Senior Management making decisions on how do we expand that team and the   recruitment that was needed for the capacity that we we required so because of the the spend and those figures that that they had so it's it's really important yes to be able to think about what is the gap that we need to fill and then of course being able to try to do your search   in because there are lots of free resources out there um that can actually help you it's   just about being a bit creative and and trying to figure out okay how do we solve our problem using some of the resources we have available yeah so so I do I do really like where the conversation is going and of course being able to prove that because analytics is all about evidence right so we have the evidence just like what Jane was saying earlier um you know show the figures show the time frame show the cycle time and once you're able to do that we can now establish that Baseline and work on how do we determine ways in which we can improve those yeah so that that's just my take on it when when you hear K on talk folks it's it's kind of like he's like fluent you know it just it just kind of just rolls out of him as if it were a second language and that's exact where we want to get first steps first you know is Excel is like your your way of managing the data that allows you to tell the stories that Jane and and Karen are saying so Jane could you take us through the four steps and folks used should be taking a picture of the screen and so that you can remember these four steps go ahead Jane yeah so if the Gap is not understanding how to prove recruitment costs as a necessity uh most Asia professionals would know that it can be quite expensive to advertise on Caribbean jobs however it's extremely useful so if your Gap is not understanding um how to present retention costs and time to hire costs you can't necessarily B build a good case to say why you need to go through the more expensive recruitment options so you go and you search and you type in um Google uh Instagram YouTube Tik Tok and you search retention analytics you search um time to hire metrics and so you know those things are isolated these are the areas you want to focus on and then you press play after Gathering quite a few different things and you press learn you know you press learn in your mind and actually absorb the information because at the end of the day if you are truly searching and interested in your own development when you start following different creators online the some of them are specialized so some of them are HR professionals and the unique specialty is um training or HR analytics so you follow the people who will give you the um best bang for your time because the budget is zero it's just really time great all right thanks Jan so let's move on to that Third Secret let me see if there's any there are no questions and then the chat is like suspiciously quiet so for the second two Secrets folks want to get those fingers working because this is an opportunity to get your questions answer from folks who could really answer um so the Third Secret is how do you convince your CEO that you should have these analytic skills without making it look like you don't have a this is this one is particularly dicey as I as I mentioned before because there are some CEOs who have just given up on HR having these skills they simply exclude HR from the conversations that they have with the CFO um the the conversation move quickly the conversations are based in numbers they can be kind of sharp elbowed you can we'll ask Jane about this when when you know when she's talking with her CFO and she gets demanding and she wants the numbers no and why can't we get 5% out of this area and why can't this and how come you're not doing this part and it's a different world it's not the the the world that often times CEOs want to expose HR too so here's the secret here's the the SE the the framework or the steps that we're recommending the first is that you understand the analytics to be presented second you show why the ROI is important and the third is that you use multiple specific examples so guys Karan and Jane you you both been Jane has been the CEO and Karan works with the CEO so you have a real idea of what would appeal to the CEO the person who is receiving the request or the information or has formed this opinion of HR and what would move the needle in terms of taking a benefits first approach so um I know both of you use this approach already so who'd like to go first maybe Kon who and how did you come up with this approach yeah yeah I'll I'll I'll I'll tackle this one um so I remember starting uh Caribbean Airlines about what two just over two years ago and having meetings with different heads uh senior managers

Etc and of course having a chat with the with the HSC manager and I had this meeting with the HSC manager and the CEO and you know when you have you know we have our HR headon you know we have the HR hatwell we're talking with with Senior Management but we do have I remember you know we talking about okay number of incidents and things happening and all these things and what the CEO was more concerned with okay how is this impacting the company in terms of our bottom line what's our downtime looking like and of course we would have provided downtime but what I what I realized is that he was focused heavily on you know compliance with OSHA ensuring you know our costs were covered and that we we aren't excessively losing based on certain downtime so it shifted now the initial discussion I had with the HSC manager and we we took a look at the the compliance standard of course for OSHA and looked at a metric called um lost time incident frequency rate because there was this perception from the agency manager that things were looking good but from the CEO's perspective it was like there's still impact on the business and it seems to be consistent so we use the metric and I pulled in things such as you know hourly rate that appli towards loss time incidents and we be able to prove that while the company has a certain amount of downtime and it is costing the company and it now justifies us to do some corrective action like training and getting personal protective equipment Etc the CEO I was able to prove to the CEO that it wasn't as bad as he thought uh in terms of the business imp back because of that one metric it was actually better so we were in a better state but now from the CEO's perspective we we now were able to change his story and share with him okay we can further improve it by ensuring we could put in some corrective action in place and by showing how much it actually was costing the company in downtime we were now able to justify a smaller investment in terms of a training budget and acquisition of certain protective resources that would Aid in reducing this downtime cost to the company so just just from that perspective you know when we speak to Senior Management we have to shift our mindset from just thinking about okay this the HR is the people side of it in terms of what you know Focus now on what the business impact is and how can it really impact the bottom line of the business so that's that was just a simple very easy story um from my experience there Francis great great Jane So if you're struggling at all with the benefits first approach I would suggest have a conversation with your CFO what are the benefits of the CE is looking at if you don't know that already and if you're not in the rooms where those kind of conversations are happening lean on your CFO there's they are your pay they um are someone that you're supposed to have a good working relationship with and ask them how are other managers getting their budgets approved what are the things that the CE is looking for in terms of benefit what are the areas of the Strategic plan that makes um the biggest difference in the company's success of course you should know these things already but if you do not you're supposed to have the Strategic plan you're supposed to have this information you're supposed to have your HR budget all of those things should be available to you and you have but if you don't you need to have them and if you report into the HR manager or the HR head of the department that is the person that you need to get that information from and if they don't have it you need to request it because the only way that you can do a benefits uh first approach is if you know what benefit the CEO and the organization prioritizes so that would be my suggestion there wait can can you share a bit about how how once again the benefit of the benefit first how you've become more benefit first focused as you sort of meet your move from HR to the CEO's office and what what happens when someone needs to speak benefits first when they speak to you as the CEO yeah I think it's helpful when they understand the priorities of the organization especially in today's world where cash flow is something that's so important so the it manager might say you know our Telecom system you know our phone system is on its last legs and we need to replace it this year and I've been holding off for so long and you as the HR professional might say you know we need to increase our salaries because things are challenging and that's going to increase our payouts on a monthly basis by 10% 5% 3% whatever it is um and the production manager might say you know my machine um specifically in the boundary Department isn't working well and I need to replace that and if I don't replace that we stop production in that area so you have competing um reasons to spend money and to spend time on certain things so having an appreciation of how you line up with the other competing factors is also important so when I would get a request sometimes from a department head I would go to the finance manager and just refresh myself with okay what do we have this month or the next two months because I know that we agreed to do our new Erp system and that we have to pay the final payment of the roll out and that's $100,000 um and the phone system it stopped working yesterday because of the situation then you as the HR professional if you know these things you know you can then show the benefit but you can also tie that benefit into timing you know and start phasing and pre-planning the money that you want to spend a little bit more effectively if you're not doing that as well because not only am I looking at the benefit I'm also looking at the benefit that HR wants to spend in comparison to the other competing uh needs as well so as that HR um transition to the CU I think when I was an HR I didn't care I didn't know I didn't um I wasn't educated on what everybody else was trying to do or the money that everybody else was trying to spend I didn't know the dollar value I didn't know the timing you know because certain uh certain things that operate in an organization sometimes happen quarterly and I might have been asking for something get told no because it literally lines up in the quarter that everything else of you know needs to be paid at that time so it's really having a good understanding of the other competing demands and I would probably say that there are times that I would have said no to something uh as a CEO that I should have said not now maybe in three months but the person just heard the know and then walked away that's not just HR that's other areas as well so it's really trying to understand those um specific things yeah and and to Echo to Echo what you're saying there Jane um you know when when you look at the approach by by understanding you know before before you go to the CEO as as you rightly said you know talk to other managers Etc it's really understanding what's valuable for them uh at this point are we concerned about turnover productivity are we concerned about workforce planning and then when we understand their priority is we also have to understand the limited budget that constraint budget that everybody's competing for um they would prioritize those Investments based on what they are interested in so if we have to make a pitch we have to ensure that our pitch aligns to what their business objectives are because it will now show that we are now a high higher priority and it now increases the chances of you getting that investment and of course using using proper examples in terms of real cases other companies applying it what are the benefits so you actually have no evidence to work alongside with your projections and your figures to Aid in them understanding and saying okay yes this could work because there is evidence of it being able to work so the chances are pretty high and it now further bolsters your pitch and so that you could get that support for what you're doing okay Karen you want to take us through the the three steps really quickly okay um summarize yeah so like like let's say we're thinking about um let's say turnover for instance and so the organization is is interested they're very concerned about you know turnover and they want to ensure that they retain their people so we have certain metrics that would align with what what the Senior Management will be interested in um they might be looking at you know let's say our turnover rate uh for certain areas it might be put or broken down by Department division Etc um we'll also be looking at retention and the factors that would lend to people staying within the organization and so we are now taking those metrics and we are going to align them to what the business is concerned with so we are going to provide evidence that will help them gain some insight in terms of the question they're asking uh within the business Arena and of course we're going to use examples of okay other organizations who would have uh encountered these issues uh with turnover more than likely you know the root cause which we would have identified let's say company ation schemes um let's say type of management type of leadership all of these items would have led towards that so we have other cases that prove very similarly to what we are going through where we can uh add value by reducing turnover by let's say training by uh improving performance in certain areas or even uh recruiting the right people maybe there are factors that would have lent towards turnover perhaps we won't we weren't hiring the right people and you know exit data summaries and all those things uh would have been contributing towards that that evidence we would have been building so taking the HR hat and understanding your metrics aligning it towards what the business is looking at and what the business considers important being able to speak their language pulling the figures pull in the dollars and cents the bottom line only that's the only way you're really going to be gaining support because both of you all will be speaking the same language Jane Jane uh I'll be pitching some good cases to you then if if I follow this process yeah okay all right let's move on to the fourth secret and the fourth one is it's actually one we we've mentioned this term before which is of course Roi but after You' gained these new skills how do you demonstrate them so that your CEO knows that that dollar was well spent that your CFO can see the return on investment uh without you having to you know come across like like you're selling the fact that this was a good investment uh so the budget first technique is one that that that Jane uses and she's mentioned this a little bit before about going to the C CFO first I've never heard I've never heard this before but go to the C CFO first and then there's I I don't know what the step I don't remember what the steps are but for free and then sticking to what you like to do and then supporting the organization so let me let me ask Jane how did you discover this technique I think it was um being in the CEO role I guess makes you think differently and you know I've just like you said like the CFO in recent times has really become that right hand I mean always was to an extent that right hand of the CU and normally the CU comes from that commercial IAL sales side or the CEO side I mean or the CFO side so getting their inputs um is critical and so I've even found myself in being in the CEO position I would ask because I'm not looking at the uh Bank balances and then reviewing it along with all the things that we had to pay that day or that month so I'm not reviewing that every single day to have it in my head all the time so I often lean on the finance manager you know to say I know that we had to pay these things that are big chunk the normal things that's fine but she would refresh my memory and help so it really is about understanding where it's at and then you know as I worked with finance and and I was the one responsible for doing the budgets of the company you know that really perspect puts things in perspective you know when you look at the budgets that you have to meet for the board what requirements are made for the profit targets and the sales targets everything you really see how it all wraps up into one so understanding value is pretty critical so that's that's kind of how I would have seen it because when I had to M manage a budget of a company it puts a really different spin on everything yeah and and K I know you you use a similar technique how did you discover that that taking that route the money first route or the CFO first route actually makes a difference yeah uh um I remember I remember we had a a training budget right of course that training budget was split across multiple departments and um at that period in time that was when you know cyber security was now becoming a kind of Hot Topic you know the ransom weting people getting attacked and all those all those things and the IT department um through Senior Management Senior Management meeting spoke about it and the importance of cyber security and it just kind of jumped out at it and they had a proposal okay we have this course we want to go on train these people and it was a fair amount of money and we assume everybody assumed that there was budget for that and okay it was approved all they the signed off and everything and by the time these guys will already abroad uh there was some issues with regard to payments because of the C Center um not having the relevant budgets in place and there was a a kind of quick scramble to try to get things organized it even reached a point where people had to come back well we we could have brought people back but fortunately you know we we had some contingencies in place to deal with it but yeah that was a that was a huge point of concern with the process where you know we need to ensure that while it's it's very tempting to put corrective action and all these things sounds great and we say okay good um but it really is important to know that if this is priority let's ensure that we have the finances in place to get it done and and if not determine where we're going to get the finances uh how they're going to shift things around and and even considering know lower cost options and all these things too if if the budgets aren't available you know time is of the essence you want to get it done so you know that's just that's just some of the things you need to think about rather than rushing and head first and saying you know everything sounds good great great so Jane I have have you queued up to take us through the four steps and what that looks like in your world your current world I know you can't go back to being an HR Manager but if you could speak to both sides of the fence that might help help our audience kind of appreciate the transition you made you mean just just in general Francis you want to just provide a little bit more context with them yes uh for CF yeah for CFO budget first and then for free just take us through the four steps sure so I think I spoke to the CFO budget first um before that I hope that if you need any more information um put it down in the chat but it really is being aligned with the CFO and the one person that the CEO is going to ask if they're in doubts about spending money on something is the CF so you know that's the person that they consult so definitely have that strong relationship with that person in your organization and obviously for free that's a no-brainer I walked I walked this through with you guys and understanding that just because it's for free doesn't mean it can't elevate your knowledge but of course you're not going to get as I said an expert level and even sometimes I mean intermediate yes but you can learn pieces of things that are really useful for free so utilize those things because you know 20 years ago 15 years ago and I now started an HR there's not you know you have to you know I think I still had encyclopedia branica floating around I was going to a dictionary you know Google was now starting when I was in university Facebook just started you know there's so many options now so don't take that for granted and of course get excited like like to do the metrics um and and trying to um find joy in elevating your skills because that's what you're telling people in the organization as a HR professional we are always encouraging others in the workplace to upskill themselves and learn more and we can't expect others to do that if we're not willing to do that as well you know and Trends are changing and you know start with the metrics that excite you you know especially when there's a need you know um just like and I'm running with this ex same example so it's um it's top of mine but for the recruitment um expenses you know several of the good recruitment agencies you have to put a down payment and the budget sometimes you know for that is zero people don't often budget for recruitment um and for me learn to see the value in what happens you know as a result of you presenting the metric and then the supporting the organization is something that you can see so you can see that before when we were using the the free ways of recruitment um we were taking three to four months to hir sales professionals since we started going on Caribbean jobs or since we engaged a recruitment company we now found the last sales person in six weeks you know and and feel good about that and obviously that's presenting the ROI and that return and you cycle back don't just present what's happening present what happened after the investment was approved and get excited about that that exent um so folks we're almost we're almost almost at the end but I'd like to hear from from both Jane and and and Karan because you know they they they have a view I'm sure as to what the future holds for HR with respect to having you know tracking these four Secrets um the the ROI the the budget the benefit and the time what what do you see for the future how is it going to change for HR Professionals in terms of the workplace changing and what what what are sea going to be asking more from HR what what what's the new ask or how is it changing from your point of view um so I I'll tackle this one first uh give give g a little time to catch her breath um we we have always been talking about you know over the recent years we've been talking about you know HR getting a seat at the table right and now we are seeing HR you know getting the seat but it's not just about having a seat it is about contributing towards the wider business benefit and it does require a shift in terms of how we think about the HR processes that we're involved in it's not just about doing it for the people and for the employees that's great because that doesn't change the the role and purpose of HR doesn't change but what happens is how do we prove that value being generated in the company right and and oh la would like to kind of answer your question there so let me use an example usinger's question right if it is if it is we taking too long right if we are taking too long with the turnaround time for recruitment what what usually happens is we might get a lower acceptance rate if we take long to hire people they probably looking for other jobs too right so acceptance rate will go down probably might lose really good talent because we took too long uh to to offer them a position yeah so if it is we seeing that and we're seeing we at let's say a 60% um acceptance rate figuring out where those bottlenecks are is important uh did we find those people through a particular source is there a bottleneck within the process where a certain manager is taking too long uh to approve a short list or even after we have the scores so if we could actually show that here what the long time of that role now has increased to maybe a further six weeks that's a cost to the organization right so the benefit of actually the benefit of actually hiring people faster we're going to get that upti much faster in terms of the capacity and of course the capability and skills within the company so so it's not just about like using metric so metric is really just a small part of the whole analytics process so HR people need to think of we need to think past the metric don't get caught each metric trap so you go to the metric you compare how it how it has our turnover rate or has our cycle time improved over the last 6 months and then of course was the trend or pattern we expect if this continues and then of course what's the business benefit of that happening so so at the end of it does this improve let's say customer service does it improve Dem man ours where we reduce uh burnout so there's a lot of connectivity across the metrics so we have to understand that the workforce and HR person needs to understand and our Workforce is connected to business outcomes and we have multiple metrics that look at every stage of that employee life cycle and they all contribute towards the business outcome so we need to kind of shift now and add on you know on top of what we currently do how does uh uh the work that we do uh impact the business yeah so hopefully I give you a little answer there great thanks Jane I would just say it's continuing to Trend um especially in Trinidad uh competing priorities you know so understanding the priorities of the other department heads and their Associated budgets are important because what I um what I've seen happening in my organization is some of the leaders going to each other and saying how about you really need this upgrade like you don't think I could just come in there before you because cash flow is definitely a big thing and in Trend that I've seen a cycle of debt you know rolling around and it's cash flow is important so you know that Trend towards prioritizing um is important so if you can get another leader to agree to defer their expenses before you even go to the CFO before you go to the CEO that's a little uh way that could help the situation so the folks you you you've heard boy I we we we've not gotten together a couple folks from our region to to deliver a message like this and it's absolutely as you can imagine pretty unique to bring together a CEO and and someone who heads up on HR analytics unit and uh the good news is that the lessons that they shared today we only had an hour and a bit and the lessons that we shared today are kind of just the the iceberg because what we really want to accomplish here at kbhr Forum or mission is to have our people who take our our conference and our members at large everyone who's in contact with us to show up in the sea Suite with the skills the the language the Insight the tradeoffs the the SE the four Secrets under their belt so that others around others around them the CEO CFO the chairman of the board can see and take the new skills into account and see that HR is in the analytics club that they imagine HR has not been in so we're we're on a mission for that so here's once again if you were here before you're in the first webinar we're going to offer another webinar on October 17th that's going to focus on analytics unit uh developing an analytics unit in your company and coming up our workshops I'll tell you a little bit about the first Workshop which is about developing your EXL skills the first two and the second two workshops are about developing and crafting an analytics unit in your company and at the end of that sequence you will receive a certificate maybe looking something like this to give you an idea of what it's like um and today we don't have any pricing but here's what an all access pass would look like which would include the entire series you'd get all the replays from last year as well as this year all the webinar replays you get to be in of course the first tools Workshop November 2nd and 16th they' be recorded in case you're going to miss any of them for any reason analytics unit Workshop would be in on January 11th and 25th there are 17 CPUs or cpds available if that's something that you want to keep a track of it's a total number of hours of classroom instruction and you get the certificate and we're going to open registration in the next webinar on October 17 so there's nothing to register in today but if you want a side by side comparison of the two packages that we're likely to offer one package includes all of the training the other package is just the Excel skills training if you're in a small business and it's not likely that they're going to have a HR analytics unit anytime soon that might be more suitable for you although these skills are skills that are very hard to acquire and I'm really recommending that everyone considered seriously taking taking the sequence so as I said there's nothing to sign up for today however if you're not on our mailing list you should jump over to our community and grab a complimentary membership and that way we'll keep you in the loop and keep keep in touch and be able to let you know when the next courses and how to register what the new links are and uh where to access the replays from this session and also you know when the discounts will be available because there will be early early bird discounts for the workshops that we have coming up so with that I'd like for you to join me in thanking our guests oh hold on there's a question uh it's a little bit late for the question I'm sorry sorry Colette um if you jump into the lounge afterwards we can get one of our one of our experts to answer the question but folks join me in thanking Kon and Jane for being a part of you know sharing their expertise oh this thing happened again sh okay all sorts of things jumping all over the place okay let me stop sharing and bring them up and folks join me in thanking thanking them for joining us and sharing this unique perspective this really is kind of just the beginning of something you know just to start where we're headed here is way past way past just the Excel skills stage but it's got to start you know with a firm foundation and guys you have any parting shots to wish to our audience as we say say goodbye no thanks thanks for coming in and of course it shows that you know you all um you're all ready to take the next step yeah I um Echo what Karen is saying you know it's important um as HR professionals to learn these types of skills to elevate the profession as a whole so good on you for making it this far great thanks folks and thanks to you our audience thanks to each and every person who showed up thank you very very much and wish you all the best take care take care guys see you in the lounge